

Building the Capacity of the Regional Center for Quality
of Health Care, Makerere University to Train
Consumers of Operations Research

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SUMMARY

The Regional Centre for Quality of Health Care (RCQHC) was established at Makerere University, Kampala, Uganda with the support of USAID. The Centre was to serve as an information-clearing house on common diseases and preventive care problems in East Africa, establish a network of collaborators, and provide technical assistance in program development. FRONTIERS contributed to the development of the RCQHC in the areas of research and research training. Between 1999 and 2003, FRONTIERS assisted the Centre to hold short courses in cost analysis and economic evaluation, and operations research. These courses relied heavily on Makerere faculty supported by FRONTIERS staff.

FRONTIERS added a Research Fellow to the Centre who worked on three operations research projects, one of which was funded by WHO. Dissemination of information to the network was the Centre's primary activity. FRONTIERS contributed to this activity by helping to establish training in topics needed by network members, and research activities that addressed network information needs and helped build the research capacity of the RCQHC. Courses taught with FRONTIERS assistance were popular and well evaluated by participants. An evaluation conducted in 2003 reported that the RCQHC required continued support to strengthen the research ability of its staff. However, in the same year, due to chronic administrative problems, FRONTIERS suspended collaboration with the Centre until such weaknesses could be corrected. Although administration and reporting are a weakness of the Centre, they maintain a high quality teaching and dissemination program, and remain interested in further developing research capacity.

I. INTRODUCTION

By the late 1990's, African health programs were enthusiastically adopting concepts related to quality of health care. Quality assurance activities, situational analyses and operations research projects were carried out by numerous local organizations with support from USAID and Cooperating Agencies (CAs). Central to this process was the creation of two regional structures. The first was a Quality of Health Care Network, encompassing members from government, NGO, and the private sector of 20 countries. The portfolio of Network activities included interventions in reproductive health (e.g. dual protection, prevention and management of STIs, postabortion care, emergency contraception) and child health (e.g. prevention and case management of malaria, nutrition, management of childhood illness).

The second structure was the Regional Centre for Quality of Health Care housed at the Institute of Public Health within the School of Medicine at Makerere University in Kampala, Uganda. Its goal is to improve quality of care through capacity building, implementation of effective interventions, and sharing of lessons learned. The Centre received financial support from the University, REDSO and many CAs. FRONTIERS assisted the Centre to sponsor capacity building and research activities in cross cutting areas including economic analysis, operations research, and materials development.

II. GOALS AND OBJECTIVES

The overall goals for this project were to develop the Centre's training and research capacity, and to contribute to its sustainability through developing short-term marketable training courses and eventually operations research (OR) credibility. The specific objectives were:

- To develop the structure and content for courses for a one-year Diploma Course in Quality of Health Care
- To develop marketing materials and advertise the training courses region-wide
- To develop the capacity to prepare and disseminate high quality research and other reports
- To increase Centre in-house research capacity through assignment of a FRONTIERS fellow to the RCQHC.

III. ACTIVITIES

Between 1999 and 2003, FRONTIERS assisted the Centre to develop short courses, incorporate budgeting, economic evaluation and operations research into the Diploma Course in Quality of Health Care, and design and produce promotional materials.

Short course in financial management and economic evaluation

The first courses were in financial management and economic evaluation. These FRONTIERS/FHI courses responded to a request from the Uganda Ministry of Health (MOH) to prepare district level health officers for the newly implemented policy of

decentralized budgeting, financial management and economic evaluation. Each course lasted five days. In keeping with the FRONTIERS policy of maximizing local participation in the facilitation of courses, five of the six facilitators were Ugandan faculty members of the Makerere Economics Department and experienced budget managers from the MOH. The sixth facilitator was a FRONTIERS/FHI staff member. The course was offered twice, in 1999 and in 2001. Total attendees included 34 program managers, researchers and policy makers from nine countries in Eastern and Southern Africa (i.e. Eritrea, Ethiopia, Kenya, Malawi, Somalia, Tanzania, Uganda, Zambia and Zimbabwe). The breakdown of participants by workshop is shown in Table 1 below.

Table 1
Participants in Budgeting, Financial Management and Economic Evaluation Course

Classification of Participants	1999	2001
Program Managers	16	8
Researchers	1	4
Policy Makers	3	2
Total	20	14

The course objectives were to improve the ability of program managers to use financial management tools to monitor and enhance program performance and to understand the factors that influence the costs and effectiveness of their programs. Specific course objectives were to enable participants to:

- Understand budget elements and mechanics
- Understand how to manage a budget
- Understand how to use the budget as a planning and monitoring tool
- Understand different types of costs
- Understand different types of cost analysis
- Understand the process and interpretation of economic evaluations

Sessions used a seminar format with in-class examples and exercises to present concepts and give the participants a chance to gain familiarity with the manipulation of data. Overall, the participants rated the courses as excellent in terms of subject matter, delivery and relevance. The course syllabus and a list of attendees are included as Appendix I.

Operations research course for managers

FRONTIERS provided technical assistance (TA) in offering a short course on OR for managers. This course lasted 3.5 days and was designed in recognition of the fact that most reproductive health program managers, especially higher level managers who make strategic decisions regarding the role of research in their programs, could not spare the two weeks required to complete the regular OR course designed for teams of managers and researchers to prepare OR proposals. The focus of the course was to define operations research and discuss its value for program decision-making. Heavy emphasis was also placed on the role, rights, and responsibilities of managers in the program research process. Extensive use was made of case studies and examples to familiarize participants with the

manager's role, and to give them confidence in such areas as reviewing research proposals for program relevance. A course outline is presented in Appendix II. Specific course areas included:

- What is OR
- The Manager's Role in OR
- Problem Identification
- Intervention Development
- Causality
- Indicators
- Research Design Exercises
- Operations Research Ethics
- Critique of OR proposals

The course was held in June 2003. Materials and presentations developed for this course served as the basis for a second course held in India in May 2004. The course was originally scheduled for the last quarter of 2002, however, most applicants for that course were researchers rather than managers. The promotional materials were re-written, and the second solicitation resulted in over 70 applicants from Anglophone Africa. The Regional Centre has a policy of running short courses at cost and only accepts participants who are fully funded by other organizations such as USAID Missions and other international donors. Consequently, only seventeen fully funded participants attended the course. The participants were from Eritrea, Kenya, Mozambique, Malawi, Tanzania, and Zambia. In general, participants rated the course very highly in meeting its objectives as shown in the Table 2 below.

Table 2
Achievement of Course Objectives

Objective	Response	
	Yes	No
1. Gave a clear definition of OR?	17	0
2. Gave a clear introduction to the role of program managers in designing and implementing research?	17	0
3. Gave a clear introduction to the role of program managers in interpreting using and disseminating research results?	17	0
4. Gave a clear introduction to research budgeting and fundraising?	13	4
5. Distinguished between useful and not useful research results?	15	2

Although course content may have been clear, it may not have been useful. Therefore, we asked to evaluate their understanding of operations research as a result of the course. As shown in Table 3 below, participants were asked to scale their level of understanding on a four-point scale.

Table 3
Understanding of Course Content

Statement	1. Not at all	2. Somewhat	3. Well	4. Very well
1. I understand how OR can improve programs	0	0	3	14
2. I can describe the differences and similarities between OR and Evaluation	0	1	7	9
3. I am able to collaborate with researchers to design and implement projects	0	0	3	14
4. I understand my role in planning, implementing and utilizing research	0	0	2	15

As with the budgeting and economic evaluation courses, Makerere furnished most of the facilitators at the OR course. Makerere staff also developed all case studies and most exercises. The RCQHC is well equipped to offer the short course without outside assistance. Indeed, one of the Makerere facilitators was in the process of developing an undergraduate course in applied research at the time of the OR course, and many of the materials developed by Makerere staff were also used in the OR for Managers Course held with IIPS, Bombay, India.

Diploma course in quality of care

The Centre offers a Diploma in Quality of Health Care. All short courses taught with FRONTIERS are open to Diploma students, and carry Degree credit.

Communications assistance

The FRONTIERS Nairobi office provided technical assistance in producing course announcements and newsletters for the Centre.

Fellow

A FRONTIERS Fellow, Frank Mugisha, a Ugandan, was stationed at the Regional Centre for Quality of Health Care for his fellowship during 2001–2003. Mr. Mugisha is a sociologist and development planner. The original objectives of his fellowship included strengthening his quantitative and qualitative research capacity so that he could conduct OR projects on his own. Training received included a three-day course on economic evaluation in South Africa conducted by FHI, instruction in SPSS and statistics, and a course in research proposal development. The fellowship experience also increased Mr. Mugisha's knowledge of reproductive and other primary health care issues. During his

fellowship, Mr. Mugisha assisted on a study of antenatal services, had the opportunity to act as principal investigator on an applied research project (see below) and produced high quality studies of the implication of Ugandan health reforms for Non-Governmental Organizations (NGOs), presenting this work at a conference in Nairobi and, in a somewhat different form, at a conference at the University of Leeds, U.K.

Research projects

Strengthening the research capacity of the Regional Center was an important component of the FRONTIERS capacity building proposal, and was specifically requested by REDSO. Being part of a University, Center staff was aware that they would eventually have to make a research contribution to African health care. However, with the passage of time and turnover of staff at REDSO, the goal of developing a research capacity at the Center was increasingly called into question. Nevertheless, the center managed and actively participated in a major research activity during 2001–2003. Two center staff members, Joel Okullo, Director, and Quinto Okello (who was prepared for his role at the month-long Cairo Demographic Center/FRONTIERS operations research course), the researcher in charge of project activities, worked on the FRONTIERS global project, “Improving Quality of Care for Family Planning Services in Uganda.” The study was conducted in collaboration with the Delivery of Improved Services for Health II (DISH II) Project and the Uganda MOH.

The study tested a package of interventions designed to increase the readiness of clinics to offer basic family planning services, to improve provider motivation, and to empower clients to request quality services. The package of interventions did not produce significant differences between experimental and control groups.

Frank Mugisha, the FRONTIERS Fellow worked first as a research assistant on an antenatal care project funded by the RCQHC and later conducted a study with Dr. Harriet Birungi of PC/Nairobi which he presented at the Sustainability Regional Conference held in Nairobi in 2002. The paper was entitled *Implications of Health Sector Reform and Public Sector Decentralization for NGO Sustainability in Africa: Examples of problems and challenges for NGOs: Uganda*. A similar paper was presented at a conference at the University of Leeds U.K. in 2003.

Mr. Mugisha was also the principal investigator on a final major research effort conducted by the Regional Centre. He was chosen by Family Health International (FHI) as principal investigator in Uganda for a multi-country study on provider perspectives on family planning quality of health care. The study was a one-year qualitative effort funded by WHO. With the encouragement of FHI, Mr. Mugisha will submit the Uganda section of the study for publication in an international journal.

Future role of research at RCQHC

Over time, two opinions emerged over the need for the Regional Centre to develop an applied research capacity. FRONTIERS original involvement was based on the assumption that the Centre would develop an operations research capacity to supplement donor income earmarked for training and dissemination. However, it soon became evident that Centre

staff was fully extended providing technical assistance in a variety of primary health care areas. Secondly, many of the technical experts employed within the Centre did not have research backgrounds. On the other hand, the location of the RCQHC in Makerere gave them access to a large number of research staff that was easily recruited to participate in research training and, potentially, research itself.

To clarify the situation, a consultant carried out an assessment of the RCQHC's research potential. The assessment concluded with a suggested plan for further development of research capacity. The report suggested that the RCQHC should begin trying to diversify its funding base through research-related work. Three key areas were identified where the Centre could be highly competitive:

- The Centre's focus on quality is unique within the region, and could be capitalized on.
- The Centre already effectively packages and disseminates information for regional partners and policymakers.
- The Centre has a strong network of agencies in countries throughout the region. Research services could be provided to these organizations.

The assessment also noted that the actual center staff had limited research skills and an information technology (IT) system necessary for research. The report concluded that the Centre would continue to require outside technical assistance in research for a number of years. FRONTIERS also found (in contrast to the Centre's ability to organize courses) that the financial and administrative reporting of the Centre was weak, and is in need of improvement whether or not the future includes a research program for the RCQHC.

IV. DISCUSSION

FRONTIERS experience with the RCQHC was productive. The three courses called for by the agreement were well subscribed and well evaluated. An especially strong element was the participation of Makerere University faculty in all three courses. Many of the materials they developed have been incorporated into on-going FRONTIERS capacity building activities. The Centre seems well prepared to teach operations research for managers without substantial additional assistance from FRONTIERS.

The RCQHC also hosted one of the more successful FRONTIERS Fellows. He worked on several research projects and produced work that qualified for presentation at international conferences and submission to a professional journal.

Despite the experience the Centre gained in the research projects in which it participated, the RCQHC continues to require research collaborators until it is able to form a core of research specialists. As important as building research capacity is the Centre's need to build administrative capacity. Administrative weakness makes all types of capacity building assistance to the RCQHC difficult. At the present time, it is not clear if the Centre will move in the direction of continuing to develop its research capacity or will remain in its niche as a technical assistance and information dissemination organization.

APPENDIX I

Regional Centre for Quality of Health Care
Short Course on
Improving Quality of Care: Foundations in Economic Evaluation
September 13 – 17, 1999
Kampala, Uganda

Objective: The objective of this short course was to train personnel from government and NGO programs in Eastern Sub-Saharan Africa in the fundamentals of financial management and economic evaluation.

Participants: See Attachment I

Facilitators: Rick Homan, FHI; Winifred Tumwikirize, Makerere Univ.
Robert Basaza, Uganda MOH; Freddie Ssengooba, Makerere Univ.
Issa Makumbi, Uganda MOH; David Kawesa-Kisitu, Uganda MOH

Content: *Financial Management of Health Services (8 sessions = 12 hours)*

Topics covered:

1. Introduction to Budget Elements & Mechanics
2. Understanding Fixed vs. Variable Budget Items
3. Preparing a Budget
4. Setting Budget Priorities
5. Managing Your Budget
6. Monitoring Budget Performance

Understanding Economic Evaluation of Health Services (10 sessions = 15 hours)

Topics covered:

1. Types of Cost Analyses
2. Types of Costs
3. Identification and Allocation of Costs
4. Planning a Cost Analysis
5. Identifying, Measuring, & Valuing Costs in an Economic Evaluation
6. Identifying, Measuring, & Valuing Benefits in an Economic Evaluation
7. Comparing Alternatives in an Economic Evaluation
8. Dealing with Uncertainty and Presenting the Results of a CEA

Format: The material was presented in a series of 18 sessions lasting for four and one-half days. The sessions used a seminar format with in-class examples and exercises to present the important concepts and gave the participants a chance to gain familiarity with the manipulation of data. There were group assignments at the end of each day so that the participants could learn from interactions with each other. Each assignment was reviewed the next morning and the results were used as inputs to subsequent exercises. On the last

day, there was a roundtable discussion with short course faculty to clarify any areas of remaining uncertainty.

Feedback: At the end of the short-course, the majority of participants indicated they were satisfied with the breadth and depth of material included in the short-course. After the first night, the group assignments became evening working groups and they found this a much more satisfying way to approach the assignments. This allowed their questions to be answered quickly rather than having to wait for the next day.

Lessons Learned: In retrospect, there was probably too much material compressed into too short a time period. If this short-course were to be offered again it might be better to introduce a weekend break between the financial management section and the economic evaluation section to give the participants a chance to re-charge. We have since simplified the exercises used in this training in an effort to reduce the time required for completion.

List of Participants

Name	Organization	City, Country
Dr. Ismael Mohammed Jemal Siraj	Ministry of Health	Massawa, Eritrea
Mr. Getachew Bekele	Marie Stopes International	Addis Ababa, Ethiopia
Mrs. Nellie A. Luchemo	Maendeleo Ya Wanawake Organization (MYWO)	Nairobi, Kenya
Dr. Peter Otiato Obado	Nairobi City Council	Nairobi, Kenya
Mr. Timothy Kachule	Project HOPE	Mulanje, Malawi
Dr. Hadge Juma	Ministry of Health & Population	Salima, Malawi
Dr. Leon Mutagoma	Ministry of Health	Rwamagana, Rwanda
Mr. Awil Haji Ali Gure	UNICEF	Hargeysa, Somolia
Dr. Joseph M. Mashafi	UMATI	Mwanza, Tanzania
Dr. Ali A. Mzige	Ministry of Health	Kibaha, Tanzania
Mr. Maximillian Mapunda	Ministry of Health	Dar-es-Salaam, Tanzania
Dr. Colleta G. Kibassa	Ministry of Health	Dar-es-Salaam, Tanzania
Mrs. Josephine Kalule	AIDS Information Centre	Kampala, Uganda
Mr. Martin O. Oteba	Ministry of Health	Kampala, Uganda
Dr. Paul Waibale	Ministry of Health	Kampala, Uganda
Dr. Gideon Kikampikaho	Mulago Hospital	Kampala, Uganda
Dr. John Bosco Rwakimari	Uganda Guinea Worm Eradication Programme	Kampala, Uganda
Mr. Stephen Suzgo Mtonga	Board of Health	Lusaka, Zambia
Dr. Puta Chilunga	Tropical Disease Research Centre	Ndola, Zambia
Mrs. Sithokozile Simba	ZNFPC	Harare, Zimbabwe

Schedule of Course Sessions

The following table indicates the schedule for course sessions. The topic and person responsible for the development and presentation of the material is shown for each session. An evening session will be held to facilitate the group work on the various exercises. These sessions are shown in the last column.

Day	9:00 – 10:30	11:00 – 12:30	1:30 – 3:00	3:30 – 5:00	Evening Assignment
1 Mon July 16	Overview of Course Goals and Objectives Homan	Introduction to Budget Elements & Mechanics Makumbi	Understanding Fixed vs. Variable Budget Items Kasadha	Preparing a Budget Kawesa-Kisitu	Review Preparation of a Simple Budget Exercise
2 Tues July 17	In-Class Budget Preparation Exercise Homan	Setting Budget Priorities Homan	Managing Your Budget Homan	Monitoring Budget Performance Basaza	Readings on Cost & Cost Analyses
3 Wed July 18	Types of Cost Analyses Tumwikirize	Types of Costs Makumbi	Identification and Allocation of Costs Ssengooba	Planning a Cost Analysis Tumwikirize	Review Calculating and Allocating Costs Exercise
4 Thu July 19	In-Class Cost Allocation Exercise Homan	Identifying, Measuring, & Valuing Costs in an Economic Evaluation Basaza	Identifying, Measuring, & Valuing Benefits in an Economic Evaluation Ssengooba	Comparing Alternatives in an Economic Evaluation Kawesa-Kisitu	Review Measuring Costs & Outcomes and Calculating CE Ratios Exercise
5 Fri July 20	In-Class CEA Exercise Homan		Course Examination & Evaluation 1:30 – 2:30	Roundtable Discussion 3:00 – 5:00 All Course Faculty	

MAKERERE COURSE SESSION: 1

SUBJECT: Financial Management & Economic Evaluation of Health Services

TOPIC: Overview of Course Goals and Objectives

DATE: Day 1(9:00 – 10:30)

PRESENTER: Rick K. Homan, Ph.D.

LEARNING OBJECTIVES:

1. Understand the goals and objectives of the short course

CONTENT:

1. Overview of Short Course Modules
 - a. Financial Management of Health Services
 - b. Understanding Economic Evaluation of Health Services
2. Overview of Course Sessions and Assignments

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format to discuss the goals and objective of the short course. Topic areas and the format of assignments will be reviewed. Information on the methods used to evaluate students and for the students to evaluate the course will be presented

ASSIGNMENT:

None

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Describe the goals and objectives of the short course
2. Describe the format of course sessions, assignments, and evaluation methods

MAKERERE COURSE SESSION: 2

SUBJECT: Financial Management of Health Services

TOPIC: Introduction to Budget Elements and Mechanics

DATE: Day 1 (11:00 – 12:30)

PRESENTER: Dr. Isa Makumbi

LEARNING OBJECTIVES:

1. Understand the components of a budget
2. Understand the financial management cycle
3. Understand how funds are distributed from centre to the district or to health facilities
4. Understand how other funds (user fees, community financing, or donor funds) flow to the district or to health facilities

CONTENT:

1. Budget Components
 - a. Revenues – including resource mobilization
 - b. Expenses
2. Financial Management Cycle
 - a. Receipt of Funds
 - b. Services Provided, Expenses Incurred and Revenues Received
 - c. Disbursements
 - d. Report on Flow of Funds
3. The Budget Cycle within Ugandan Ministry of Health / Ministry of Local Government
 - a. Schedule of Payments
 - b. Disbursement Process
 - c. Accounting Process
 - d. Request for Adjustments

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format using Ugandan Ministry of Health and health facility budgets as examples. Terminology that will be used throughout the module will be presented and discussed.

ASSIGNMENT:

To be determined by the presenter

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Identify and be able to interpret the basic elements of a budget
2. Describe the financial management cycle within a health facility
3. Describe the budget process in general and within the Ugandan MOH

MAKERERE COURSE SESSION: 3

SUBJECT: Financial Management of Health Services

TOPIC: Understanding Fixed vs. Variable Budget Items

DATE: Day 1 (11:00 – 12:30)

PRESENTER: Ugandan Ministry of Health Personnel

LEARNING OBJECTIVES:

1. Understand the difference between fixed and variable costs
2. Understand broad budget categories for expenditures

CONTENT:

1. Types of Costs
 - a. Fixed
 - b. Variable
2. Expenditure Categories
 - a. Employee Costs
 - b. Administrative Costs
 - c. Supplies and Services
 - d. Transport and Plant Costs
 - e. Property Costs
 - f. Transfer Payments to Other Agencies or Persons
 - g. Other Expenditures
 - h. Loan Payments

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format using examples from the Ugandan Ministry of Health budgets and health facility budgets.

ASSIGNMENT:

To be determined by the presenter

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Differentiate between fixed and variable costs
2. Categorize expenses within a budget

MAKERERE COURSE SESSION: 4

SUBJECT: Financial Management of Health Services

TOPIC: Preparing a Budget

DATE: Day 1 (3:30 – 5:00)

PRESENTER: Ugandan MOH Personnel

LEARNING OBJECTIVES:

1. Understand the purpose of preparing a budget
2. Understand how to prepare a budget for a particular activity / programme
3. Understand how to include fixed costs in a budget.

CONTENT:

1. Purpose of a Budget
 - a. Serves as a planning document
 - b. Provides information on financial feasibility
 - c. Aids in the control use of resources
 - d. Helps in setting priorities
 - e. Identifies cost of activities
 - f. Provides advance warning of resource shortfalls
2. Budgeting for an Activity
 - a. Identify necessary inputs
 - b. Estimate quantity of inputs required (based upon expected output)
 - c. Identify unit cost of each input
 - d. Multiply quantity by unit cost
3. Including fixed costs in the budget
4. Programme Budgeting

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format using examples from the Ugandan Ministry of Health programmes.

ASSIGNMENT:

Prepare a simple budget based upon data provided in class. Groups will be formed and each group will prepare a separate budget for a different organizational activity. These budgets will be combined on Day 2 during class sessions to illustrate how budgets assist in priority setting, the monitoring of expenses, and the response to budget variances.

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Explain the potential uses of a budget
2. Prepare a budget for an activity and a programme

MAKERERE COURSE SESSION: 5

SUBJECT: Financial Management of Health Services

TOPIC: In-Class Budget Preparation Exercise

DATE: Day 2 (9:00 – 10:30)

PRESENTER: Rick K. Homan, Ph.D.

LEARNING OBJECTIVES:

1. Understand how the data provided in the group assignments should have been utilized to obtain an activity budget
2. Understand how to combine activity budgets with fixed costs to derive a programme budget.

CONTENT:

3. Review of Activity Budget Exercises
 - a. Group report on activity budget
 - b. Comparison of group assignment results with anticipated results
4. Combining Activity Budgets into Programme Budgets

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format to discuss the results of the group assignments. Areas of disagreement will be identified and discussed. After agreement on the individual activity budget, a programme budget will be prepared and discussed.

ASSIGNMENT:

None

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Use expenditure and service data to prepare a activity budget
2. Combine activity budgets and fixed cost data to obtain a programme budget

MAKERERE COURSE SESSION: 6

SUBJECT: Financial Management of Health Services

TOPIC: Setting Budget Priorities

DATE: Day 2 (11:00 – 12:30)

PRESENTER: Rick K. Homan, Ph.D.

LEARNING OBJECTIVES:

1. Understand how to use a budget to set priorities

CONTENT:

1. Setting Budget Priorities
 - a. Resource requirements of an activity
 - b. Cost of an activity
 - c. Expected Outcome of an activity
2. Adjusting a Budget
 - a. Changing the scale of an activity
 - b. Changing responsibilities

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format that uses the results of the programme budget prepared in the previous session to motivate a discussion of how to respond to an anticipated budget shortfall. Strategies for setting budget priorities within a programme as well as adjusting activities will be highlighted.

ASSIGNMENT:

None

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Use the information in a budget to assist in setting priorities
2. Identify and evaluate modifications to activities that affect the budget

MAKERERE COURSE SESSION: 7

SUBJECT: Financial Management of Health Services

TOPIC: Managing Your Budget

DATE: Day 2 (1:30 – 3:00)

PRESENTER: Rick K. Homan, Ph.D.

LEARNING OBJECTIVES:

1. Understand how to develop a cash flow projections worksheet
2. Understand how to establish financial controls to manage receipts and disbursements

CONTENT:

1. Developing a Cash Flow Projections Worksheet (Cash Budget)
 - a. Anticipating Shortages
 - b. Responding to Anticipated Shortages
 - a) Changing the timing of an activity
 - b) Changing the timing of the flow of funds
2. Controlling and Managing Funds
 - a. Standardizing procedures
 - b. Distributing responsibilities
 - c. Regulating transactions as they occur
3. Financial Records

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format with hypothetical examples of cash flow projections for programme activities. Documents that assist in the management of funds and the reconciliation of accounts will be presented.

ASSIGNMENT:

None

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Predict, control, and manage funds within a programme
2. Maintain financial records necessary to support a programme

MAKERERE COURSE SESSION: 8

SUBJECT: Financial Management of Health Services

TOPIC: Monitoring Budget Performance

DATE: Day 2 (3:30 – 5:00)

PRESENTER: Dr. Robert K. Basaza

LEARNING OBJECTIVES:

1. Understand the importance of a budget performance report
2. Understand how to develop mechanisms to track revenues by source

CONTENT:

1. Budget Performance Report
2. Monitoring Income
3. Reporting back to Source of Funding (Vote Books)

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format using actual examples of documents used in the monitoring of budgets whenever possible.

ASSIGNMENT:

To be determined by presenter

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Generate and use information to monitor budget performance
2. Develop mechanisms to monitor income and report back to source of funding

MAKERERE COURSE SESSION: 9

SUBJECT: Introduction to Costs and Cost Analyses

TOPIC: Types of Cost Analyses

DATE: Day 3 (9:00 – 10:30)

PRESENTER: Dr. Winifred A. Tumwikirize

LEARNING OBJECTIVES:

1. Understand the terminology used in cost analyses
2. Understand a simple typology of health care evaluation approaches
3. Understand different types of economic evaluations

CONTENT:

1. Basic Terminology in Cost Analyses
2. Typology of Health Care Evaluations
3. Importance / Uses of Economic Evaluations
 - a. When to conduct an economic evaluation
 - b. Misuse of economic evaluation
4. Types of Economic Evaluations
 - a. Cost-minimization analysis
 - b. Cost-effectiveness analysis
 - c. Cost-utility analysis
 - d. Cost-benefit analysis

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format to provide an overview of where the module will be heading.
Terminology that will be used throughout the module will be presented and discussed.

ASSIGNMENT:

Drummond et al. (1997) “Basic Types of Economic Evaluation” in Methods for the Economic Evaluation of Health Care Programmes (Second Edition) Oxford: Oxford University Press; 6-26.

To be discussed in class

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Correctly use the basic terminology used in cost analyses
2. Present a simple typology of health care evaluations
3. Discuss the importance / uses of economic evaluations
4. Describe the different types of economic evaluations

MAKERERE COURSE SESSION: 10

SUBJECT: Introduction to Cost and Cost Analyses

TOPIC: Types of Costs

DATE: Day 3 (11:00 – 12:30)

PRESENTER: Dr. Isa Makumbi

LEARNING OBJECTIVES:

1. Understand the terminology used to describe costs
2. Understand the difference between accounting measures of costs and economic measures of costs

CONTENT:

1. Basic Terminology in Cost Identification
 - a. Fixed Costs vs. Variable Costs
 - b. Direct Costs vs. Indirect Costs
 - c. Recurrent vs. Capital Costs
 - d. Shared vs. Unshared Costs (Joint vs. Non-Joint Costs)
 - e. Average Costs vs. Marginal Costs
2. Accounting vs. Economic Costs
 - a. Expenditures vs. Opportunity Costs
 - b. Valuing donated inputs / volunteers
 - c. Handling capital costs

INSTRUCTIONAL METHOD:

Seminar and in-class exercise format to provide examples of how costs are evaluated in cost analyses. Types of costs will be identified and defined for use in subsequent sessions.

ASSIGNMENT:

Participants will be presented with cost and service statistic data and asked to estimate average and marginal costs for different outputs.

To be discussed Day 4 at 9:00 – 10:30

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Correctly use the basic terminology used in cost analyses
2. Accurately describe the difference between accounting costs and economic costs
3. Estimate the economic costs for donated inputs and capital items

MAKERERE COURSE SESSION: 11

SUBJECT: Introduction to Cost and Cost Analyses

TOPIC: Identification and Allocation of Costs

DATE: Day 3 (1:30 – 3:00)

PRESENTER: Dr. Freddie Ssengooba

LEARNING OBJECTIVES:

1. Understand how costs can be allocated to outputs
2. Understand the difference between top-down and bottom-up approaches to cost allocation

CONTENT:

1. Relationship between inputs and outputs
2. Cost Allocation Techniques
 - a. Top-down
 - b. Bottom-up
 - c. Blended

INSTRUCTIONAL METHOD / MATERIALS:

Seminar and in-class exercise format to provide examples of how costs can be allocated to outputs.

ASSIGNMENT:

Groups will be provided with budget and service statistic data for different clinics and asked to use the techniques from the previous exercise to allocate costs to different clinic outputs.

To be completed in-class on Day 4 at 9:00 – 10:30

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Allocate costs to outputs
2. Discuss the merits of top-down vs. bottom-up approaches to cost allocation
3. Allocate costs to different services within a clinic setting

MAKERERE COURSE SESSION: 12

SUBJECT: Conducting an Economic Evaluation

TOPIC: Planning a Cost Analysis

DATE: Day 3 (3:30 – 5:00)

PRESENTER: Dr. Winifred A. Tumwikirize

LEARNING OBJECTIVES:

1. Understand how a cost analysis is designed
2. Be able to identify problems, objectives, and alternatives for which a cost analysis would be appropriate
3. Understand the importance of perspective when valuing costs and benefits

CONTENT:

1. Defining the Problem and Perspective
2. Specifying Objectives
 - a. appropriate
 - b. measurable
3. Identifying Alternative Means of Pursuing Objectives

INSTRUCTIONAL METHOD:

Seminar and in-class exercise format to provide examples of how to set the parameters for a cost analysis. Example may include the integration of STD services to FP clinics.

ASSIGNMENT:

To be determined by presenter

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Identify and evaluate the decisions necessary when designing a cost analyses
2. Describe the link between perspective and the subsequent valuing of costs and benefits
3. Design a cost analysis

MAKERERE COURSE SESSION: 13

SUBJECT: Conducting an Economic Evaluation

TOPIC: In-Class Cost Allocation Exercise

DATE: Day 4 (9:00 – 10:30)

PRESENTER: Rick K. Homan, Ph.D.

LEARNING OBJECTIVES:

1. Understand how the data provided in the group assignments should have been utilized to allocate costs to different clinic outputs.
2. Understand how cost allocation techniques can influence results.

CONTENT:

1. Complete Cost Allocation Exercise
2. Review of Cost Allocation Exercises
 - a. Group report on estimated cost of clinic outputs
 - b. Comparison of group assignment results with anticipated results
2. Comparing Cost Estimates Across Clinics

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format to discuss the results of the group assignments. Areas of disagreement will be identified and discussed. After agreement on the individual cost allocations, a comparison of unit cost estimates across clinics will be prepared and discussed.

ASSIGNMENT:

None

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Use budget and service statistic data to allocate clinic costs to clinic outputs
2. Compare unit cost estimates from different clinics and discuss sources of variation

MAKERERE COURSE SESSION: 14

SUBJECT: Conducting an Economic Evaluation

TOPIC: Identifying, Measuring, & Valuing Costs in an Economic Evaluation

DATE: Day 4 (11:00 – 12:30)

PRESENTER: Dr. Robert K. Basaza

LEARNING OBJECTIVES:

1. Be able to identify cost components
2. Be able to measure and value cost components

CONTENT:

1. Identifying Cost Components
 - a. Direct Costs
 - b. Indirect Costs
 - c. Intangibles
 - d. Role of Perspective in Identifying Cost Components
2. Measuring and Valuing Cost Components
 - a. Data Collection Techniques
 - b. Role of Perspective in Assigning Value

INSTRUCTIONAL METHOD / MATERIALS:

Seminar and in-class exercise format to provide examples of how to identify, measure and value cost components in an economic evaluation.

ASSIGNMENT:

Exercise in identifying and valuing costs for the integration of STD services within FP clinics.

To be discussed Day 5 at 9:00 – 12:30

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Describe the link between perspective and the identification, measurement, and valuation of cost components
2. Identify, measure, and value cost components for an economic evaluation

MAKERERE COURSE SESSION: 15

SUBJECT: Conducting an Economic Evaluation

TOPIC: Identifying, Measuring, & Valuing Benefits in an Economic Evaluation

DATE: Day 4 (1:30 – 3:00)

PRESENTER: Dr. Freddie Ssengooba

LEARNING OBJECTIVES:

1. Be able to identify program benefits
2. Be able to measure and value program benefits

CONTENT:

1. Identifying Program Benefits
 - a. Direct Benefits
 - b. Indirect Benefits
 - c. Intangible
 - d. Role of Perspective in Identifying Program Benefits
2. Measuring and Valuing Program Benefits
 - a. Data Collection Techniques
 - b. Role of Perspective in Assigning Value

INSTRUCTIONAL METHOD / MATERIALS:

Seminar and in-class exercise format to provide examples of how to identify, measure and value program benefits in an economic evaluation.

ASSIGNMENT:

Exercise in identifying and valuing benefits for the integration of STD services within FP clinics

To be discussed Day 5 at 9:00 – 12:30

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Describe the link between perspective and the identification, measurement, and valuation of program benefits
2. Identify, measure, and value program benefits for an economic evaluation

MAKERERE COURSE SESSION: 16

SUBJECT: Interpreting the Results of an Economic Evaluation

TOPIC: Comparing Alternatives in an Economic Evaluation

DATE: Day 4 (3:30 – 5:00)

PRESENTER: Dr. Isa Makumbi

LEARNING OBJECTIVES:

1. Be able to use data on costs and benefits to compare alternative programs
2. Understand the importance of incremental cost-outcome ratios to decision process

CONTENT:

1. Computing the Cost-Outcome Ratio for Alternatives
 - a. Discounting future events
 - b. Denominator vs. numerator
2. Importance of Incremental Cost-Outcome Ratios
 - a. Compared to what?
 - b. Ordering and dominance

INSTRUCTIONAL METHOD:

Seminar and in-class exercise format to provide examples of cost-outcome ratios are computed and potential pitfalls.

ASSIGNMENT:

Exercise in combining the results of exercises from sessions 14 and 15 to compute and interpret the cost-outcome ratios for the integration of STD services within FP clinics.

To be discussed Day 5 at 9:00 – 12:30

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Compute a cost-outcome ratio and an incremental cost-outcome ratio
2. Interpret cost-outcome ratios and interpret incremental cost-outcome ratios as a guide to decision making

MAKERERE COURSE SESSION: 17 & 18

SUBJECT: Interpreting the Results of an Economic Evaluation

TOPIC: In-Class Economic Evaluation Exercise

DATE: Day 5 (9:00 – 12:30)

PRESENTER: Rick K. Homan, Ph.D.

LEARNING OBJECTIVES:

1. Understand how the data provided in the group assignments should have been utilized to estimate the cost effectiveness of STD integration.
2. Understand how the selection of an outcome measure influences the results of the economic evaluation.

CONTENT:

1. Complete Economic Evaluation Exercise
2. Review of Economic Evaluation Exercises
 - a. Group report on estimated cost effectiveness of STD integration
 - b. Comparison of results using alternative effectiveness measures
2. Comparing Cost-Effectiveness Estimates Across Alternatives

INSTRUCTIONAL METHOD / MATERIALS:

Seminar format to discuss the results of the group assignments. Areas of disagreement will be identified and discussed. After agreement on the individual cost-effectiveness calculations, a comparison of alternative methods of integration will be prepared and discussed.

ASSIGNMENT:

None

BY THE END OF THE SESSION, PARTICIPANT WILL BE ABLE TO:

1. Estimate the cost-effectiveness of an intervention
2. Compare the cost-effectiveness of alternative interventions

APPENDIX II

IMPROVING QUALITY OF CARE THROUGH OPERATIONS RESEARCH SHORT COURSE June 16 - 20, 2003

REGIONAL CENTRE FOR QUALITY OF HEALTH CARE MAKERERE UNIVERSITY

SESSION ONE

DISCUSSING RESEARCH EXPERIENCES

Objectives:

- Assessing participants views, attitudes, understanding and experience of Operations Research
- Bringing participants at the same level for effective participation in the course (ice-breaking, language/jargon of OR)
- Participants' expectations

Content Pointers:

- Participants introducing themselves
- Participants present their expectations of the course
- Outline questions (guide) to facilitate the Session e.g.:
 - Experience(s) or presence of OR in the participants' home/operational environment
 - Who have been (or can be) involved and how
 - Participants' involvement in research as a Manager - discussing research experiences

Method of Session:

Participatory experience sharing (workshop type)

Duration:

2 Hours

Responsible: Joel Okullo and Jim Foreit

All other facilitators to be present (to the extent possible)

Materials and References:

- A guide for the discussion-based session

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SESSION TWO

WHAT IS OPERATIONS RESEARCH

Objectives:

- Defining Operations Research and how it differs from other types of research/monitoring/evaluation and basic academic type of research
- Defining the domain of OR – i.e. the focus and objectives of OR
- Why OR is necessary (that is, appreciation of OR...)

Content Pointers:

- What is or is not OR; difference between OR and evaluation research, etc..
- Identifying bottlenecks in program services delivery – increasing services quality and utilization;
- OR can form a basis for informed decision making
- Examples of OR/Application (across thematic areas)

Method of Session:

Presentation and Discussion

Duration:

- 1 Hour

Responsible: Jim Foreit and Joel

Materials and References:

- follow up with Ian and Jim

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SESSION THREE

COMPONENTS OF AN OR PROJECT

Objectives:

- Describing an OR proposal
- Learning from experience

Content Pointers:

- It is intended that a proposal is presented to the participants up-front so that they are aware that this has been done somewhere and to be able to know what to look for and to introduce them more concretely to the OR jargon.

Method of Session:

Practical session

Duration:

- 2 Hours

Responsible: Jim Foreit

Materials:

- Ready made proposal(s)

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SESSION FOUR

ROLE OF PROGRAMME MANAGERS IN OPERATIONS RESEARCH

Objectives:

- To orient participants to their role in planning, implementation, utilization and dissemination of Operations Research results;
- Sensitize Managers on the importance of OR so that they can include it in their contributions to the District plans, etc..

Content Pointers:

- 4.1 Defining managers' roles in the operations research process
e.g. program/problem identification, decision on research required, setting parameters, and planning for utilization and dissemination...
- 4.2 Dealing with outsiders (i.e. negotiating space/roles with planners, policy makers, donors, users...)
- 4.3 Usefulness of OR in program management....
- 4.4 Scenarios Presentation:
 - 1. The programme managers will be given a generic OR proposal and ask them to work in groups to identify their roles
 - 2. The program managers are given a report of an OR intervention (that is a completed work) which shows the role that the Program Manager did or did not do. They would then critique this Program Manager with a view to charting out [try to get an Operations Research carried out in Uganda
 - 3. A program manager can come and give a testimony on their role in the OR projects [e.g. VCT projects - AIC (Josephine Kalule?) or one of the DDHSs, or projects that IPH has been involved with]

Method of Session:

Presentation; Scenario/Case-based Presentation & Discussion

Duration:

- 2½ Hrs case/scenario group discussion
- ½ Hr Presentation

Responsible: Jim Foreit and Fred Mangan Wabwire

Materials and References:

- (- scenarios or cases)

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SESSION FIVE

IDENTIFYING RESEARCHABLE PROGRAM PROBLEMS

Objectives:

- encouraging program managers (and researchers) to examine the effects of interventions as broadly as possible..
- orienting participants into best OR projects that have been done...
- demystifying Operations Research as a tool for quality of services improvement
- starting from the more familiar, i.e. program evaluation, and transform this into a broader Operations Research endeavor - that is, rather than doing the generic evaluations, the program Managers develop OR projects
- building on the existing programs knowledge e.g. in district health systems research, formative research

Content Pointers:

- 1.1 Major OR topic areas as a guide to program problem identification (impact, access, quality of care, resources..)
- 1.2 Discussion of which problems lend themselves to Operations Research; what is researchable or non-researchable – why and how?
- 1.3 Problem statement formulation and problem justification
- 1.4 Library and network search for evidence of a problem (include a session on computer competence including internet use)

Method of Session:

Brainstorming
Presentation

Duration:

- 3½ Hours

Responsible: Ian Askew and Fred Wabwire

Materials and References:

- Participants are provide with a list of "problem write-ups"
- Participants come up with 'problem' write-ups for brainstorming (to help in content pointer #5.3)

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SESSION SIX

INTERVENTION DEVELOPMENT/FORMULATION

Objectives:

- Designing an Operations Research project
- Appreciating the appropriateness of alternative/different OR designs
- Building the capacity to know when to do Operations and when not to (what is the right way to do OR?)

Content Pointers:

- 6.1 Process of intervention (OR) development
 - who is to be involved; negotiation; feasibility; viability...
- 6.2 Sustainability or/and replicability of the intervention
- 6.3 The link between interventions and indicators

Method of Session:

Presentation
Exercise & Discussion

Duration:

- ½ Hour
- 2 Hrs

Responsible: Jim Foreit

Materials and References:

- A defined problem and objectives (half proposal) and work out the possible solution(s)
- Utilize Implementation Development tools e.g. the Performance Improvement Framework

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SESSION SEVEN

**INDICATOR DEVELOPMENT
FOR PROBLEM IDENTIFICATION & SUCCESS**

Objectives:

- Defining operationally the key variables and terms of the study/program

Content Pointers:

- 7.1 Operational definitions of variables
- 7.2 Type (process, effect and impact indicators)
- 7.3 Sources (accessibility of source....)
- 7.4 Quality of indicators (reliability, validity...)
- 7.5 Program/Problem specific indicators (link between interventions and indicators)

Method of Session:

Presentation
Exercise & Discussion

Duration:

- 45 min. of presentation
- 1 Hour 15 min. of exercise & discussion

Responsible: Jim Foreit and Frank Mugisha

Materials and References:

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SESSION EIGHT

**APPRECIATING THE CONCEPT OF CAUSALITY
AND RESEARCH DESIGN**

Objectives:

- Understanding the concept and taking advantage (or being aware) of causal relations in program management
- Appreciating the appropriateness of alternative/different OR designs

Content Pointers:

- 8.1 Principles of causality (introducing participants to experimentation)
 - why study causality
 - quality of the evidence including aspects of indicators and whether one is dealing with local, national, or international standards/evidence
 - control of external factors
- 8.2 Designing to demonstrate causality
 - appreciating appropriateness on different OR designs
 - issues of what is credible; causality requirements
 - characteristics of an experimental design
- 8.3 Comparative difference versus statistical significance
 - significance and importance of difference
 - statistical difference versus practical
 - precision
- 8.4 Comparison as a general principle

Method of Session:

Presentation & Discussion
Exercise

Duration:

- 2 Hours

Responsible: Ian Askew and Joseph Konde-Lule (& Edward K. Kirumira)

Materials and References:

- Ian to provide
- See also the power point presentation of Jim Foreit

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SESSION NINE

ETHICS OF OPERATIONS RESEARCH

Objectives:

- introducing basic philosophies underlying major codes, declarations other documents on ethics of/in research
- main requirements for a systematic framework for evaluating the ethics of OR

Content Pointers:

- 9.1 Principles and international and national ethical standards
- 9.2 What is ethical and what makes for unethical conduct (critiquing)
- 9.3 Whose ethics (consent - who, what type, legality)
- 9.4 Minors, vulnerable populations
- 9.5 Engaging communities and/or other stakeholders
- 9.6 Informed consent from (health unit) administration vs. individual h/w
- 9.7 Monitoring beyond ethical approval (compliance..)

Method of Session:

Presentation & Discussion

Duration:

- 2 Hours

Responsible: Joel Okullo, Harriet Birungi and Robinah Najjemba

Materials and References:

- International Declarations
- FHI Research Ethics Curriculum

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SESSION TEN

RESOURCE REQUIREMENTS AND THEIR MOBILIZATION

Objectives:

- Budgeting and writing skills for fund-raising
- Improve on sourcing and negotiating skills of program managers

Content Pointers:

- 10.1 Knowing how to access funding (resource mobilization) - starting from existing resources
- 10.2 Types of resources, alternative sourcing – the pros and cons
 - types of resources, alternative sourcing – the pros and cons
 - reflect on district budgets & planning, institutionalizing resources for research
- 10.3 Developing partnerships (expectations, qualities looked for, inputs & outputs, ownership, benefits, responsibilities...)
 - Donors/MOH/Districts
 - Researchers/Institutions (institutional
 - Communities
 - Technical Assistance
 - NGOs
- 10.4 Ability to manage a partnership and resources
- 10.5 Does the problem justify the amount of resources required (do benefits outweigh resource levels required) – when is decision required
- 10.6 Principles of budgeting for OR

Method of Session:

Facilitated Discussion
Cross-country experiences discussion

Duration:

- 2 Hours

Responsible: Edward K. Kirumira
Robert Basaza (MOH)

Materials and References:

- WHO GUIDELINES
- District Budgeting Guidelines

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SESSION ELEVEN

INTERPRETATION, DISSEMINATION & UTILIZATION OF RESULTS

Objectives:

- introduction to a variety of ways that OR results can be used
- Orient the trained Managers into the best OR projects/interventions that have been done – probably linking them directly with those projects or with people who have carried them out or provided technical assistance
- skills development in communicating results for policy and program decision making
- encouraging evidence-based approach to decision-making

Content Pointers:

Interpretation

- 11.1 Distinguishing between good, useful and/or poor results
 - Comparative difference versus statistical significance
 - significance and importance of difference
 - statistical difference versus practical
 - precision
 - Interpreting qualitative results

Dissemination

- 11.2 Who, how, when, what (developing a dissemination strategy...)
 - Role of the Manager in communicating results
 - identify audience
 - organizing local dissemination – how, when.....
 - utilization, scaling-up
 - Documentation of process,
 - Writing reports that will cause action

Utilization

- 11.3 Utilization of results (how can the Managers use the results/information – practicalities of putting to use or ensuring that results are used.....)
 - From research to scaling-up
 - moving from pilot programs - what is needed
 - knowing when to scale up or replicate and when not to

Method of Session:

Presentation
Discussion
Resource Persons (..., politicians...)

Duration:

- 1 Hr 45 min. session
- 1 Hour for exercise

Responsible: Ian Askew and Jim Foreit

Someone from Policy Analysis Unit in MOH (Christine Koruna)
Ludwig Laws (MOH/IPH)

Materials and References:

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SESSION TWELVE

APPLYING SKILLS LEARNED

Objectives:

Assessing skills learned by participants

Content Pointers:

What to look for in a proposal?

- Guidelines for proposal review
- Process of reviewing OR proposal

Method of Session:

Simulation of a review committee to review a ready-made good and bad proposal
(to be circulated the night before) IPH and Jim to provide proposals.
Checklist for proposal review (Population Council, WHO)

Duration:

2 Hours

Responsible: Harriet Birungi and Joel Okullo, Tulane University

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SESSION THIRTEEN

**EVALUATION, OPERATIONS RESEARCH FOLLOW-ON
PLANS AND CLOSING**

Objectives:

- Forge teams and/or network building for increased application of skills acquired
- Course evaluation
- Course Certificates presentation

Content Pointers:

- 13.1 Provide outline
 - identify researchable program problem(s) for future collaboration
 - possibilities for step-down training
- 13.2 Time frames for follow-on activities
- 13.3 Evaluation format for now and for follow-up
- 13.4 Distribution of Participants' and Facilitators' addresses

Method of Session:

Interactive

Duration:

2 Hours

Responsible: Joel Okullo and Jim Foreit

Materials:

- Evaluation Forms
- Certificates

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TIME	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
9.30 – 10.30 a.m.	1. Discussing Research Experiences <i>Joel Okullo</i>	5. Identifying researchable program problems - Problem statement formulation	7. Indicator Development 7.1 – 7.5 <i>Jim and Frank</i>	9. Ethics of Operations Research <i>Joel, Harriet & Robinah</i>	12. Applying Skill Learnt (Plenary) <i>Harriet & Joel</i>
BREAK 10.30–11.00 am	B	R	E	A	K
1.00 pm – 1.00p.m.	2. What is OR - Defining OR - Why OR necessary <i>Jim and Joel</i> 3. Components of an OR Proposal/Intervention (based on OR thematic areas) <i>Jim Foreit</i>	- Discussion of problems that lend themselves to OR - Literature search <i>Fred and Ian</i>	8a. Appreciating the Concept of Causality & Research Design - Causality & Design <i>Ian and Joseph/Edward</i>	10. Resource Requirements <i>Edward & MOH</i>	13. Evaluation, OR Follow-up Plans and Closing <i>Joel and Jim</i>
LUNCH 1.00 – 3.45 pm	L	U	N	C	H
	4a. Role of Program Managers in OR - Case/scenario group discussions <i>Fred Wabwire</i>	6. Intervention Development - issues - Exercise guide (15 min.) <i>Jim and Edward</i>	8a. Appreciating the Concept of Causality & Research Design - Exercise <i>Ian and Joseph/Edward</i>	11. Interpretation, Dissemination & Utilization Results <i>Ian & MOH</i>	
BREAK 3.45 - 4.00 p.m.	B	R	E	A	K
4.00 – 5.00 p.m.	4b. Role of Program Managers - Plenary Presentation <i>Fred Wabwire</i>	Intervention development - Exercise (cont..) - Discussion of Intervention Development Exercises <i>Jim Foreit</i>	SITE VISIT <i>Course Coordinator</i>	11. Interpretation, Dissemination & Utilization Results <i>Ian & MOH</i>	
			Group Evening?		

Note:

- (i) Registration planned for the previous day (Evening)
- (ii) Session 1 ends at 10.00 am, then Tea and then Session 2 and 3 will be 2½ hours
- (iii) Session 7 reduced from 2hrs to 1 hr; suggest to have a day going up to 6.00 p.m. to compensate for the hour lost

**Uganda Course 2003
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